

Core Responsibilities Matrix for WIC Services

WIC Service Re-Structuring Planner

The following table presents a matrix of core responsibilities for WIC agencies and clinics to consider as they discuss their re-structuring plans and opportunities with potential alliance partners. The information below assumes a certain division of labor and/or responsibility amongst the Montana Department of Public Health and Human Services' WIC Office, a local lead agency, and any number of satellite WIC clinics managed by a local lead agency. In many instances, lead agencies will also serve in the role of "satellite WIC clinic." Consider how you might use the following matrix of core job responsibilities to re-structure the provision of WIC services in your jurisdiction through contracted service arrangements, memoranda of understanding, etc.

General Task Area	State Agency	Lead Agency	Satellite WIC Clinic
Administration (Planning)	Determine the amount to be budgeted to Lead Agencies. Review subcontracts and agreements between Lead Agency and contracting satellite(s).	Determine the overall budget for the service area, work with Satellite to determine appropriate portion of budget to assign.	Collaborate with the Lead Agency to determine the appropriate budget for the Satellite.
	Provide training and technical assistance to the Lead Agency for the development of the nutrition education, breastfeeding promotion and support, and the outreach plans.	Develop a nutrition education plan, breastfeeding promotion and support plan, and an outreach plan for the service area. Strive to meet the goals of the plans.	Collaborate with the Lead Agency in the development of the nutrition education plan, breastfeeding promotion and support plan, and an outreach plan for the service area. Strive to meet the goals of the plans.
	Develop guidelines for required essential services during an emergency situation or staffing shortage	Develop a plan for providing minimal essential services during an emergency situation or staffing shortage to provide such coverage to all clinic sites.	Collaborate with the Lead Agency in the development of the minimal essential services plan. Notify the Lead Agency when a situation arises which required guidance from the State Office.
Administration (Management)	Develop the State Plan for the operation of the WIC Program in Montana which includes all policies, procedures and guidance.	Ensure compliance with State Plan including policies, procedures and guidance. Submit Local Agency policies and forms effecting participant eligibility to the State Office for approval.	Ensure compliance with State Plan including policies, procedures and guidance. Submit Satellite policies and forms effecting participant eligibility to the Lead Agency to forward to the State Office for approval.
	Contract with the Lead Agency.	Contract with the State Agency. Contract with <i>Satellite Counties /Service Areas</i> . Determine services/items to be provided by a satellite agency or subcontractor and any allowable charges.	

General Task Area	State Agency	Lead Agency	Satellite WIC Clinic
	Determine contracting agencies and service areas.	Request and maintain clinic sites. Determine staffing requirements for service area.	Provide accurate information for the determination of staffing and site locations.
	Per Federal Regulations, establish standards for staff providing nutrition services.	Ensure qualified staff/personnel are employed at Lead Agency and Satellite.	Employ staff meeting nutrition services standards.
	Establish standards for RD services.	Ensure adequate RD services for all participants in service area to meet state standards.	
	Provide technical assistance to the Lead Agency. Provide guidance as needed for administration of the program.	Provide administrative oversight and technical assistance (not computer problems) to the Satellite. Request TA and guidance from the State Office with regard to questions and issues from all clinics.	
	Disseminate policy changes, procedure changes and updated information to Lead Agency representative.	Disseminate policy changes, procedure changes and updated information received from State Agency to all staff in service area.	Disseminate policy changes, procedure changes and updated information received from Lead Agency to all staff in clinic.
	Determine standards for participant records which meet federal and Montana WIC requirements.	Maintain participant records meeting federal and Montana WIC requirements.	Maintain participant records meeting federal and Montana WIC requirements in the manner determined by the Lead Agency.
	Disseminate information to the Lead Agency liaison or the appropriate coordinator (BF, retailer, nutrition, training, outreach, etc.).	Serve as the liaison for the service area with the State Agency. Ensure coordination of the dissemination of information (BF, retailer, nutrition, training, outreach, etc.). Update the State Agency with any changes.	
	Be responsible to Lead Agency concerns by addressing issues of compliance, problems or concerns when presented.	Address issues of compliance, problems or concerns for Lead Agency and Satellite. Seek TA from State Office when necessary.	

General Task Area	State Agency	Lead Agency	Satellite WIC Clinic
	Review expenditure reports and request further information for payment processing as needed. Submit payment requests through AWACS.	Determine appropriateness of expenditures submitted by Satellites. Submit expenditure report for service area to State Agency. Reimburse Satellites for appropriate allowable expenditures.	Submit expenditures for agreed upon items to the lead agency.
	Send Lead Agency monthly participation reports for service area.		
	Audit and review Lead Agency expenditure and payroll reports as required.	Lead Agency will maintain documentation for expenditure claims and payroll records including requiring Satellite to maintain such records for its claims. Provide required audit reports for service area.	Maintain documentation of expenditures and time distribution. Submit to the Lead Agency upon request. Provide required audit reports for clinic area.
	Provide Lead Agency with Nutrition Education Accounting (time study) timelines and procedures. Compile reports and submit final report to USDA-FNS. Determine non-compliance penalty for each Lead Agency.	Perform Nutrition Education Accounting (time study) according to requirements. Submit reports for all clinics. Ensure that service area meets the 1/6th requirement.	.
	Provide state approved nutrition education materials, forms and supplies.	Consolidate order for state approved nutrition education materials, forms and supplies and disseminate to clinics in the service area.	
	Establish standards for computer equipment used to operate the WIC system.		
Program Monitoring & Quality Assurance	At a minimum, provide bi-annual monitor visits to Lead Agency and selected Satellites.	Perform self-monitors for service area as per state plan.	

General Task Area	State Agency	Lead Agency	Satellite WIC Clinic
	Determines the standards for all WIC Program training (nutrition education, breastfeeding education, etc.) and provides training opportunities. State Agency will ensure all staff obtains adequate continuing education credits.	Ensure all staff in the service area receive appropriate training to meet the State Agency standards for nutrition education, breast-feeding education, etc. Ensure participants receive nutrition education and breastfeeding education meeting the standards within the service area. Ensure all program staff receives adequate continuing education credits relevant to training needs and job duties.	
	Determine Lead Agency staff training needs based upon requested training, monitoring visits, technical assistance requested and federal guidance.	Inform State Agency of training needed in service area. Request guidance for appropriateness of training provided by other sources.	
WIC Staff Training	Upon request review other training opportunities for appropriateness to WIC staff needs and approval for continuing education credits.	Request from the State Office prior approval for CEU's for non-State WIC sponsored training. Provide information about objectives, target audience, topics, hours, etc.	Submit if necessary requests for continuing education credits prior to training events.
	Develop the curriculum for orientation standards (VENA, CBT, Computer Training, Civil Rights, etc.).	Inform State Office of new employees in service area.	
	Develop curriculum and materials for Competency Based Training (CBT.) Provide technical assistance to Lead Agency on CBT. Ensure all local agency staff completes CBT within appropriate time lines.	Designate CBT training coordinator who will ensure all staff within the services area completes CBT within appropriate time lines. Provide guidance to satellite.	Ensure all staff within the satellite completes CBT within appropriate timelines.